

Corporate Plan 2020-21

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Opening Statement

(Statement of Preparation)

I, as the head of the accountable authority of the Special Broadcasting Service Corporation present the 2020-21 SBS Corporate Plan for the period 2020-21 to 2023-24 as required under paragraph 35(1)(b) of the *Public Governance, Performance and Accountability Act 2013* and under section 48 of the Special Broadcasting Service Act 1991.

The plan is prepared in accordance with the Public Governance, Performance and Accountability Rule 2014.



George Savvides AM

Chair

Special Broadcasting Service

Our Purpose

"SBS inspires all Australians to explore, respect and celebrate our diverse world and in doing so, contributes to a cohesive society."

As described in our Charter, the principal function of SBS is to provide multilingual and multicultural broadcasting and digital media services that inform, educate and entertain all Australians, and, in doing so, reflect Australia's multicultural society.

SBS was established to positively contribute to Australian social outcomes, recognising we are a nation built on immigration. For over 45 years, SBS has been recognised for its contribution to Australia's success as a multicultural society.

SBS contributes to the ongoing development of a vibrant and cohesive multicultural society by providing a holistic suite of multilingual and multicultural radio, television and digital media programs and services to meet the needs of Australia's multicultural society and Aboriginal and Torres Strait Islander communities. In doing so, SBS promotes understanding and acceptance of the cultural, linguistic and ethnic diversity of the Australian people. Through delivery of its content and services, SBS helps migrants understand and appreciate the country they now call home, whilst helping all Australians to better understand and respect each other and our many cultures, to aid social cohesion.

Our goal in delivering on our purpose and our Charter in the upcoming years will include a continued focus on building a distinctive network across both traditional and digital platforms, to allow a diverse array of views and voices to be represented in mainstream media. SBS also continues to provide unique services that support migrant communities and Aboriginal and Torres Strait Islander peoples and promote the benefits of diversity to all Australians, at a time when inspiring a greater understanding of the value of multiculturalism has never been more important.

Maintaining Australia as a healthy, vibrant, diverse and inclusive society is key to our future success as a nation.

External Environment

COVID-19 has had a significant impact on Australia. Economic repercussions are predicted to be substantial, with negative GDP growth and high unemployment in 2020-21. In response, Federal and State Governments have implemented major stimulus packages to support households, help employers stay in business and keep people in jobs. The impact on the media industry has been material, with the suspension of production, interruptions to content supply and advertising revenue declines. Significant cost-saving measures have been implemented across all commercial broadcasters as a result. The Federal Government also granted temporary relief to commercial broadcasters in the form of a temporary suspension of spectrum licence fees, and regulatory forbearance in relation to local content quota obligations until the end of 2020.

In response to COVID-19, SBS quickly implemented a range of measures to protect our people, operations and the organisation. While longer-term challenges to the industry may arise from COVID-19, the updated SBS four-year strategy remains relevant and fit-for-purpose, despite the short-term revenue and content supply challenges.

Social and Demographic Influences

Migration has been central to the economic and social development of Australia as a nation, and has played an important role in Australia's cultural identity.

The Australian population increased to 25.5 million people in September 2019¹ and is predicted to reach 30 million between 2029 and 2033, according to the Australian Bureau of Statistics.² Overseas migration has been the main driver (60%) of recent growth but will slow down in 2020-21 due to the international travel restrictions for non-resident and non-Australian citizens entering Australia implemented in late March 2020 due to COVID-19. The international travel bans and global travel restrictions will have a short-term effect on net migration. As a result of the enduring success of Australia's immigration policies, a significant proportion of Australia's population are second generation migrants. Latest Census data shows that 21% of the population identify as being a second generation Australian, having at least one parent born overseas.³ When combined with first generation Australians, nearly half (49%) of all Australians were either born overseas or had at least one parent who was born overseas.

Today there are more than 300 identified languages spoken in Australian homes, and more than one-fifth of Australians speak a language other than English at home.⁴ After English, the next most common languages spoken in Australian homes are Mandarin, Arabic, Cantonese, and Vietnamese.

Despite the increasing proportion of the population being from Culturally and Linguistically Diverse (CALD) backgrounds, including those who are second or third generation migrants, these communities and their voices remain largely under-represented in today's media.⁵

1. Australian Bureau of Statistics (2019), 3101.0 – Australian Demographic Statistics, Sep 2019, accessed on 15 June 2020, retrieved from: <https://www.abs.gov.au/AUSSTATS/abs@.nsf/mf/3101.0>

2. Australian Bureau of Statistics (2019), 3222.0 – Population Projections, Australia, 2017 (base) – 2066, accessed on 15 June 2020, retrieved from: <https://www.abs.gov.au/ausstats/abs@.nsf/O/5A9C0859C5F50C30CA25718C0015182F>

3. Australian Bureau of Statistics (2017), 2071.0 – Census of Population and Housing: Reflecting Australia – Stories from the Census, 2016, accessed on 15 June 2020, retrieved from: <https://www.abs.gov.au/ausstats/abs@.nsf/Lookup/by%20Subject/2071.0-2016-Main%20Features-Cultural%20Diversity%20Data%20Summary-30>

4. *ibid.*

5. Screen Australia (2016), *Seeing ourselves: Reflections on diversity in Australian TV drama*, accessed on 15 June 2020, retrieved from: <https://www.screenaustralia.gov.au/getmedia/157b05b4-255a-47b4-bd8b-9f715555fb44/TV-Drama-Diversity.pdf>

External Environment (cont.)

As Australia opened its doors to migration, our attitudes towards different ethnicities and multiculturalism have changed for the better. Since 2007, the Scanlon Foundation has released the *Mapping Social Cohesion* report, which measures Australia's progress against key social cohesion indicators. The 2019 survey showed that while there is some concern about the level of immigration, Australians continue to recognise the benefits of immigration. There remains a steady and high level of endorsement of multiculturalism and strong levels of positive identification towards Australia:

- 90% of respondents indicated that they have a 'sense of belonging in Australia'
- 85% of respondents agreed that multiculturalism has been good for Australia
- 81% agree that immigrants are good for Australia's economy
- 63% agree that accepting migrants from different countries makes Australia stronger⁶

However, we cannot take social cohesion for granted – 7 in 10 Australians (up from 6 in the previous year) are also worried about the impact of immigration on overcrowding cities, house prices, and government failure to manage population growth. 57% of Australians agreed with the statement that many immigrants are not adopting Australian values and 41% think the number of immigrants accepted into Australia is too high.

SBS was established to ensure that Australia's growing migrant population was provided with vital community information to support engagement with Australian society and increase social cohesion. With increasing cultural and linguistic diversity, and the likely social, economic, and physical and mental health challenges Australians will face in the wake of the COVID-19 pandemic, there is even greater need to build mutual understanding and respect between different sections of the community. Reflecting the diversity of Australian society will be increasingly important, not only for broadcasters but for the general good of our society.

SBS stands at the forefront of servicing an increasingly diverse Australia by providing unique multicultural and multilingual services, broadcasting and sharing culturally diverse stories and presenting a range of viewpoints. SBS ensures that multicultural, Indigenous and other diverse communities have their stories shared and voices heard in the Australian media landscape, and provides a forum for debate and discussion vital to Australia's capacity to address significant issues facing communities and our society as a whole.

SBS will continue to provide essential services to multicultural Australia to help drive Australia's economic recovery, including by fostering multilingualism. As reported by the World Economic Forum, speaking more than one language can boost economic growth, given that speaking multiple languages can help build trade relations.⁷

SBS will also continue to assist migrants and all speakers of languages other than English (LOTE) in Australia by supporting civic participation and social cohesion, which creates positive outcomes for economic participation, and mitigating risks to inclusion such as racial discrimination. Economic participation for Australians who speak a language other than English is equally critical – SBS language services enable this by providing news and information on issues including business matters, taxation, property and related government policies and initiatives.

6. The Scanlon Foundation (2019), *Mapping Social Cohesion 2019*, accessed on 15 June 2020, retrieved from: <https://scanloninstitute.org.au/report2019>

7. World Economic Forum (2018), *Speaking more than one language can boost economic growth*, accessed on 15 June 2020, retrieved from: <https://www.weforum.org/agenda/2018/02/speaking-more-languages-boost-economic-growth>

External Environment (cont.)

In August 2019, Deloitte Access Economics (*Deloitte*) published a report commissioned by SBS entitled *The Economic Benefits of Improving Social Inclusion*.⁸ For the first time in this way, Deloitte quantified the potential lift to Australia's economy that could be driven by improved employment and health outcomes, increased workplace productivity, and reduced costs of social services, as a result of greater social inclusion. The report shows that improved social inclusion could mean quantifiable economic benefits to Australia of \$12.7 billion per annum.⁹

Developing and maintaining trust with audiences will continue to be a challenge for traditional media, social media and digital platforms. Rapid social change and an event like the COVID-19 pandemic can lead to distrust between different communities and, in some cases hostility and discrimination. Media and public broadcasting play an important role in setting the tone of public discourse and ensuring diverse viewpoints and stories are presented, particularly in a highly concentrated media landscape.

*In the wake of the 2019-20 Australian bushfires and COVID-19, there is increased reliance on public broadcasters for factual, trustworthy, impartial news and information. SBS continues to be one of Australia's most trusted news sources with a long-held and well-earned reputation for quality news and analysis on global and local events, especially issues across multicultural and Indigenous Australia.*¹⁰

In delivering on our Charter, over the course of this four-year plan, SBS will continue to evolve its services to meet the needs of audiences, reflecting changes in social and demographic composition, and technological developments and innovation.

Regulatory Influence

Over the reporting period covered by this Corporate Plan, SBS's operations are likely to be impacted directly and indirectly by regulatory change.

Triennial Funding

In 2019, SBS's budget was confirmed for the 2019-20 to 2021-22 financial years, following completion of the triennial funding process. At the time of writing, the Federal Government delayed the delivery of the 2020-21 Budget from April 2020 to October 2020, due to COVID-19.

8. Deloitte Access Economics (2019), *The Economic Benefits of Improving Social Inclusion*, August 2019, accessed on 15 June 2020, retrieved from: <https://www2.deloitte.com/au/en/pages/economics/articles/economic-benefits-improving-social-inclusion.html>

9. *ibid.*

10. Essential Research (2019), *Trust in Media Outlets*, accessed on 15 June 2020, retrieved from: <https://essentialvision.com.au/trust-media-outlets>

External Environment (cont.)

Government Response to ACCC Digital Platforms Inquiry

In July 2019, the Australian Competition and Consumer Commission (ACCC) published the final report of its Digital Platforms Inquiry. The report contained 23 recommendations, including maintaining stable funding for public broadcasters, reviewing media regulation laws with the aim of a more harmonised regulatory framework, establishing a new specialist digital platforms branch within the ACCC, and developing a mandatory take-down code (with remit to the Australian Communications and Media Authority (ACMA) to assist copyright enforcement on digital platforms such as those operated by Google and Facebook. SBS actively engaged with relevant stakeholders throughout the inquiry.

In response to the ACCC's findings, the Federal Government announced several key policy and funding changes in December 2019. The government set out a staged consultation process towards platform-neutral regulation, regarding online and offline delivery of media content to Australian consumers. The first stage of media regulation reforms commenced in early 2020 with a focus on developing a uniform classification framework across all media platforms, consideration of Australian content requirements across broadcasters and subscription video-on-demand services, and identifying other aspects of the policy framework to support Australian screen content. SBS has been engaged in each of these policy review processes.

As an outcome of the Digital Platforms Inquiry, the ACCC also undertook the Digital Advertising Services (Ad Tech) Inquiry, exploring issues faced by market participants, in particular examining the bargaining power imbalances between Australian news media businesses and the digital platforms. SBS made submissions to these processes during the reporting period.

In April 2020, the government directed the ACCC to create a mandatory code of conduct that will require Google and Facebook to compensate publishers of Australian news content. The ACCC published a draft code in August 2020 and SBS continues to engage with the ongoing consultation process.

Review of Australian local content requirements

In April 2020, the government announced a COVID-19 pandemic relief package for the industry, and released an Options Paper, co-authored by ACMA and Screen Australia, regarding future Australian content obligations for free-to-air television broadcasters, and whether obligations should apply to subscription video-on-demand services such as Netflix and Disney+. The government and its agencies subsequently undertook a consultation on the Options Paper from April to June, with industry stakeholders invited to make formal submissions.

Reforms arising from this review will affect SBS and the content market competitive environment. SBS participated in the consultation process and made a formal submission.

Audio Description

SBS is committed to telling stories that matter and recognises that Audio Description (AD) can provide meaningful benefits to blind and vision-impaired Australians by increasing access to these stories. In December 2019, the government announced funding for SBS and the ABC to introduce AD services, which provide an auditory narration of the non-verbal elements of a program. During gaps in dialogue, it describes visual elements such as scenes, settings, actions and costumes. The government announced that the national broadcasters were expected to begin offering AD services to audiences by 1 July 2020.

External Environment (cont.)

On 5 April 2020, SBS launched a trial of its AD services, ahead of the formal launch of the full service in June 2020.

SBS main channel (standard definition and high definition) and SBS VICELAND now provide audio described programs.

Review of Australian Classification Regulation and Online Safety Legislative Reform consultation

As part of the outcome of the ACCC's Digital Platforms Inquiry, the Department of Infrastructure, Transport, Regional Development and Communications and the ACMA conducted two concurrent consultations – the Review of Australian Classification Regulation and the Online Safety Legislative Reform consultation during 2019-20.

SBS made submissions to both during the reporting period. In its submission to the Australian Classification Regulation, SBS indicated its support for modernisation and harmonisation of Australia's media regulation, noting that a harmonised regulatory framework does not require a 'one size fits all' approach. SBS supported the current regulatory framework for classification categories and complaint handling processes as set out in the SBS Codes of Practice, including the current complaint escalation pathway to the ACMA for broadcast content. In its submission to the Online Safety Legislative Reform, SBS indicated its support for a new online safety regulatory framework that mitigates online risks and ensures Australians can confidently take advantage of the benefits of the digital environment. SBS submitted that any new regulatory framework should work alongside and complement existing effective frameworks for media services, including SBS's well-established and fit-for-purpose Codes of Practice.

Future Delivery of Radio

In March 2020, the ACMA published the final report of its Future Delivery of Radio consultation process, which underlined the vital importance of radio to Australian audiences. Findings included that Australia's geographic diversity and range of listening environments will continue to require a mix of radio delivery platforms. Among other technologies, the report considers how Digital Radio Mondiale (DRM) may play a part in the future technology mix – a technology SBS recommended be considered as possible successor to AM in the medium-term.

Market Influences

Over the past several years, SBS has seen significant changes unfold within the market in which SBS operates. The changes and trends observed are consistent with those seen in overseas markets and SBS anticipates that current trends will continue over the next planning cycle as audiences move online and the competition for digital audiences intensifies.

Audiences

Traditional linear broadcast TV continues to represent the majority of video viewing in Australia. However, Australians continue to evolve and expand the ways that they consume and engage with content.

External Environment (cont.)

Observations

- While the penetration rates of new consumer technologies have slowed, the rate of audience fragmentation across both broadcast and digital platforms is expected to increase. The 2019 Communications Report published by ACMA noted that 11% of Australian adults (with a TV set in the home) have four or more subscription or pay-as-you-go services in their household in 2019, up from 8% in 2018. 71% of Australian adults have at least one service in their household, an increase from 69% in 2018.¹¹
- While free-to-air television will continue to have the largest share of video consumption, the shift to digital will accelerate as content options on alternate platforms continue to improve and the familiarity and acceptance of those platforms increase. Live primetime viewing in particular will continue to be affected as video consumption increasingly shifts to playback, IP-delivered content and other screen usage.
- Smart TVs, connected gaming consoles and portable devices have changed the way Australians are consuming media, driving increasing non-linear consumption such as gaming, on-demand video, internet browsing and music streaming. The ACMA predicts that in 3 years, the average Australian household will have 18 devices connected to the internet.¹²
- Smartphones and tablets will continue to evolve as important platforms for discovery and engagement with audio and video content, particularly as Australian internet infrastructure improves through the rollout and adoption of fibre optic broadband and the new 5G mobile network.
- Younger audiences lead the charge in adopting new technologies and alternative modes of content consumption. The uptake and use of social media have broadened significantly across age demographics and will become increasingly mainstream for content distribution and advertising across all age groups as audiences utilise aggregation services and platforms to consume content.
- Due to the natural shift in the way audiences are consuming content, premium drama and live sport are commanding an increasingly important place on network linear television slates across the country.

Implications

- As audiences continue to transition to digital and our digital transformation becomes part of our regular workflow, we need to focus on delivering audience needs and generating consistent audience 'stickiness' for our digital products, not just in the wake of high-profile content or major disasters occurring.
- Cross-platform content distribution is crucial to the success of content discovery and consumption. In delivering digital media services in line with its Charter, SBS has accelerated investment in digital media content. This will continue over the next planning cycle, with a focus on enhancing our digital capabilities.
- SBS will continue to acquire and commission distinctive content to educate, entertain and inform all Australians, in line with its Charter, on all platforms – linear and digital.
- SBS will continue to focus on content distribution strategies including social media, to improve its reach and engagement, particularly with younger audiences.

11. Australian Communications and Media Authority (2019), *Communications Report 2018-19*, accessed on 15 June 2020, retrieved from: <https://www.acma.gov.au/sites/default/files/2020-04/Communications%20report%202018-19.pdf>

12. Ibid.

External Environment (cont.)

- The distribution of content via online technology and social platforms may limit the commercialisation of certain content for media operators, placing greater emphasis on designing new and additional strategies around digital inventory and advertising.
- The ability to promote and capitalise on flagship SBS events which captivate large audiences will also play an increasingly important role in defining SBS's brand. SBS will continue to focus on creating impact via SBS events and engagements, to strengthen the relationship it has with the community.

Competitive

Observations

- Since 2015, there has been a proliferation of new over-the-top providers entering the Australian market, heightening overall interest in on-demand video streaming and the rapid growth in digital video consumption. In the past 12 months, Disney+, Apple TV+ and Binge (operated by Foxtel) launched in Australia. The period from 2020-2024 will likely be one of consolidation as the market hits maturity.
- There is ever-increasing competition amongst commercial free-to-air broadcasters whose business models are geared to global reality formats and live sports, in pursuit of acquiring and retaining large scale audiences. Audience interest in reality television is persisting, with dating/ relationship, cooking and renovation formats ubiquitous on Australian television. We can also expect acceleration in the product offer from Broadcaster Video On Demand (VOD) services and Subscription VOD services (such as Nine's 9Now and Stan), as commercial free-to-air operators (FTAs) look to transition to viewership and revenues on digital platforms.
- The relative value of access to free-to-air spectrum as a competitive advantage will continue to diminish as consumption of digital content continues to grow. This was reflected in changes to the licence fee and spectrum pricing structures applicable to commercial free-to-air broadcasters in 2018. In April 2020, the government announced a 12-month waiver of spectrum licence fees for all commercial television and radio broadcasters, as part of its industry relief package in response to COVID-19.
- The Australian VOD market is approaching saturation and maturity against a backdrop of the financial challenges posed on commercial FTAs by COVID-19. Commercial FTAs have not only been impacted by advertising revenue falls, but the shutdown of marquee sporting competitions and suspension of production will also lead to a delay and shortage of content to monetise, which will persist beyond the shutdown. Any severe economic downturn following COVID-19 will also put both SVOD and ad-supported platforms under pressure as consumers reduce spending and cancel some of their subscriptions.

External Environment (cont.)

Implications

- New entrants to the market may impact SBS's competitive standing when they compete directly with SBS for content and /or compete with SBS for audience time. However, it is worth noting that not all new market entrants have an impact on SBS – for example those which focus on premium sports or children's content.
- Public service broadcasters can remain relevant in this shifting environment by creating and promoting local content, a unique proposition that the global on-demand providers struggle to provide. SBS will continue its investment in local commissions that are uniquely Australian and aligned with its Charter. SBS intends to continue the legacy of commissioning high-quality content which is thought-provoking, ambitious and which promotes social cohesion.
- COVID-19 enabled SBS to demonstrate the vital role our multilingual services play in serving Australian communities, with the SBS Multilingual Coronavirus Portal widely used and positively received.¹³ Our digital video offering in SBS On Demand has also seen growth and is holding audience beyond the easing of social restrictions. COVID-19 showed that SBS's language capabilities are a key strength and competitive differentiator. In FY21, SBS will look to further extend our multilingual offering across our platforms.
- Continued investment in digital content, products and capabilities, is crucial to allow SBS to defend against competitors, new and old to deliver, excellent content curation and a user experience that meets audience expectations.
- As the competitive advantage of access to free-to-air spectrum declines, SBS will build on the value of its digital properties and quality distinctive content so that it remains accessible and relevant to all Australians in the digital era.

Financial Context

Government Revenue

Observations

- Based on current triennial funding estimates, SBS is expected to receive approximately \$887 million over the period FY2019-20 to FY2021-22. However, the postponement of the Federal Budget to October 2020, will also delay confirmation of SBS funding for FY2020-21.
- Over the five-year period up to 2019-20, SBS's efficiency program has culminated in over \$48 million of realised savings in 2019-20. These efficiencies have been generated through vigilant annual planning processes, workflow improvements, the renegotiation of supplier agreements, an evolved operating model utilising best-in-class technology solutions, and investment in a working environment that fosters agile practices and a highly engaged workforce. SBS has reinvested these efficiencies in the growth of its digital services and distinctive cross-platform content in line with its Charter, to educate, entertain and inform all Australians. SBS has tripled its digital consumption hours across 2015-16 to 2019-20 and increased its metro share in a declining free-to-air market.
- SBS will continue to make a strong case for ongoing and sustainable levels of government funding to ensure the continued delivery of its valued services to the Australian community.

13. For example, see Australian Federal Parliament Senate (2020), *Official Hansard (Wednesday 13 May 2020) – Motion on SBS Multicultural Coronavirus Portal*, accessed on 15 June 2020, retrieved from: https://www.aph.gov.au/Parliamentary_Business/Hansard/Hansard_Display?bid-chamber/hansards/d1b94f32-61e9-47e8-ab31-cc37f40b5093/&sid=0000

External Environment (cont.)

Implications

- SBS is committed to ensuring that the content which it produces reflects its Charter and continues to do so in a cost-effective manner.

SBS's unique hybrid funding model means that commercial returns may be channelled back into curating Charter-focused content, while continued government funding supports allows for stability and long-term creative ambitions to be realised.

Own-source revenue

Observations

- SBS generated approximately 27% of its total operating revenue in 2019-20 from its commercial activities.
- With advertising expenditure gradually shifting from television to online platforms, most industry research companies predict a modest negative growth forecast for linear broadcast advertising revenues over the period of this Corporate Plan. This is partially offset by rapid growth in digital video advertising, gently tapering off over the next four years.
- The immediate impact of COVID-19 has seen the advertising market slow down, with companies reducing their marketing spend to cut costs. Advertising is expected to pick up in early-to-mid FY2021, with some companies already starting to restore spend in digital ad categories. On the broadcast media side, commercial media companies have had their revenues affected to varying degrees and we are seeing the industry respond quickly to shore up their business through savings measures to safeguard against the economic unpredictability ahead.

Implications

- As the traditional free-to-air advertising model comes under increasing pressure, SBS's content commercialisation activities will seek to maximise financial returns on available multi-platform inventory while maintaining competitive pricing on each of SBS's free-to-air channels and across the different metropolitan and regional markets.

This will be in line with the restrictions on the amount of advertising permitted on SBS broadcast services and in keeping with SBS's editorial guidelines. SBS will continue to invest in its digital advertising capabilities to capitalise on the growing shift to digital content. This will include investing to grow SBS On Demand and other digital properties to maximise the value of online inventory.

- It is also important that SBS continues to build on existing and new partnerships to ensure consistent growth of advertising inventory across all platforms.

External Environment (cont.)

Cost Considerations

Observations

- Competition for quality content across an increasing number of platforms will drive up acquisition costs.
- Increased competition from new entrants in the Australian media landscape, particularly from global SVODs and FTAs ramping up their BVOD services, is driving up competition for quality content. This includes competition for premium international content as companies seek to build deep and wide content libraries to attract and retain audiences.
- There is increased competition from telecommunication companies as they seek to aggressively push into more content provision services including sport, placing upward pressure on the cost of content rights.
- The material drop in advertising revenues due to COVID-19 has impacted the bottom lines of commercial FTAs, including regional broadcasters, forcing staff cuts and other expense reduction initiatives.
- Pre-COVID-19 it was becoming increasingly challenging for organisations to acquire and retain talent in knowledge areas and for 'newer' skills such as digital technology and big data. COVID-19 will only exacerbate this problem further, with university funding set to suffer due to the flow-on effects of international travel restrictions.
- Attracting strong talent with commercial and digital experience will put upward pressure on our human resource cost-base as these roles are in high demand across industries. Across all industries, companies face a substantial shortage of digital talent such as full stack software engineers, cloud engineers, data engineers and data scientists.
- With these external forces putting upward pressure on our largest cost categories (content and employees) there will be even greater emphasis on ensuring SBS's support and back-office functions are delivered as effectively and efficiently as possible.

Implications

- As the advertising environment continues to evolve, and advertising spend shifts from linear to digital platforms, we should ensure our commercial capabilities are fit-for-purpose and attractive to advertisers (by appropriately leveraging available data and utilising integrated advertising and reporting systems). We will continue to upgrade our digital advertising capabilities and access 'best of breed' technology in a cost-effective manner.
- An increased number of content players in the market provides added opportunities for SBS to collaborate with other organisations e.g. our partnership with Vice Media Group to deliver SBS VICELAND, delivering large audience numbers whilst lowering the cost to reach such audience numbers.
- There are also increased opportunities for SBS to engage in co-productions with content suppliers to provide distinctive quality commissioned content at reduced cost.
- SBS will continue to identify and deliver further efficiencies within its operations. The pressure to be cost-aware helps drive the continuous improvement of existing methods of delivery across the whole organisation.

As a lean organisation, SBS is suitably structured to transform itself to overcome external pressures to deliver content in the most efficient and effective manner.

Planned Performance

Significant Activities

The following activities and goals cover the planning period spanning 2020-21 to 2023-24.

The operations of SBS can be broken down into four key activities, all of which contribute to SBS delivering on its Charter and achieving its purpose:

"...SBS inspires all Australians to explore, respect and celebrate our diverse world and in doing so, contributes to a cohesive society..."

These activities are:

- Content creation, acquisition and curation;
- Content broadcast, technology and transmission;
- Content commercialisation; and
- Content support activities.

Table 1 describes these activities in more detail.

Table 1: SBS's significant activities

Significant activity	Description
Content creation, acquisition and curation	<ul style="list-style-type: none">— Commissioning, in-house production, acquisition and curation of content for the following platforms:— Broadcast television— Broadcast radio— Online content including digital (IP-based) delivery of on-demand and live streaming video and audio content— Delivering formal and informal learning outcomes, as content extension activities.
Content broadcast, technology and transmission	Transmission of SBS's created or acquired content via linear broadcast transmission and IP-delivered platforms. This also includes broadcast operations and broadcast technology and systems.
Content commercialisation	<p>Commercialisation of SBS's created or acquired content via a range of commercial activities which include:</p> <ul style="list-style-type: none">— SBS advertising media sales— International and domestic content sales— Subscription services and other commercial partnerships
Content support activities	<p>The corporate and other back-office functions required to support the above significant activities. These include:</p> <ul style="list-style-type: none">— Enterprise-related IT— Finance and accounting— People and culture— Legal— Facilities maintenance (Corporate services)— Corporate affairs

Planned Performance (cont.)

Figure 1 below provides a summary of SBS's strategic goals over the period covered by this Corporate Plan.

Figure 1: Summary of SBS's 4-year Strategic Goals

Delivering against our Charter and purpose					
<i>SBS inspires all Australians to explore, respect and celebrate our diverse world and in doing so, contributes to a cohesive society</i>					
1. Great People; Great Culture	<i>'I'm hearing great things about working at SBS'</i>				
	<ul style="list-style-type: none"> — Our strong focus on our people and our culture is 'how' we are going to succeed — Creating new opportunities and ways of working whilst protecting our people, operations and organisation against the effects of COVID-19 				
2. Distinctive Network	<i>'Showcasing Australia's Diversity'</i>				
	<ul style="list-style-type: none"> — Exploring, respecting and celebrating diversity in all its forms is central to our content activities, especially via culturally and linguistically diverse content to TV, radio and online audiences — Providing multicultural communities with factual and trustworthy information in their preferred language — Increasing the hours of subtitled flagship content and growing in-language user experiences on our digital platforms 				
3. Inspired Communities	<i>'It's all about our communities'</i>				
	<ul style="list-style-type: none"> — Partnering with our many communities to understand key issues and perspectives, and tell their important stories — Building on our NAIDOC partnership and further cornerstone activities that help to define SBS, and our services with the wider Australian community — Continuing to protect and harness our trusted position with communities, stakeholders and foster social inclusion 				
4. Great Business	<i>'Best-in-class operations'</i>				
	<ul style="list-style-type: none"> — Best-in-class operational cost base, processes and globally unique deals — Continuing to create opportunities within the broader industry by differentiating where it matters, and partnering with others in their areas of strength 				
5. Engaged Audiences	<i>'Deep audience engagement on all platforms'</i>				
	<ul style="list-style-type: none"> — Continuing with our digital acceleration plan and providing an excellent audience experience across all platforms to drive engagement and consumption — Improving our capabilities to serve our distinctive content to all audiences in any language and on any platform 				
SBS Values	We are audience obsessed	We are bold and brave	We embrace difference	We engage and participate fully	We look out for one another

Planned Performance (cont.)

This framework sets out the five focus areas for the organisation, over the course of the four-year Corporate Plan. These focus areas will help SBS achieve its purpose by:

- Reaching more Australians with SBS's distinctive and compelling Charter-focused content
- Building audience awareness, scale and engagement on our digital platforms to ensure our relevance as people increasingly consume content on these platforms
- Delivering "best in class" user experience for audiences on our digital platforms to improve audience engagement and loyalty
- Growing the share of funding that is invested into Charter content by increasing returns from commercial activities, while continuing to innovate and find more efficient ways of conducting our existing operations
- Attracting and retaining the best people by making SBS a great place to work

Cooperation with other bodies

SBS cooperates with a range of government, corporate, industry and non-profit organisations that make a significant contribution to SBS to help it deliver on its Charter and achieve its purpose. The list of organisations and the nature of each of these relationships can be found in the Appendices.

1. Content Creation, Acquisition and Curation

Content creation (covering in-house and commissioned content), acquisition and curation are at the heart of SBS's purpose. Through content delivered across all our platforms, SBS seeks to inspire a richer, more holistic understanding of our world and presents surprising perspectives in entertaining and innovative ways. SBS continues to lead the conversation about the big national and global issues which have an impact on all Australians, with a focus on unifying our diverse communities.

From the crucial role we played in providing public information and support during the 2019-20 bushfire and COVID-19 crises to our rich collection of international content and original productions, our content offering brings people together and inspires viewers to think new things and feel a sense of connection, belonging and empowerment.

Through our core content activities delivered across all platforms we create and curate content for our audiences that:

- Inspires inclusivity and social cohesion
- Enriches and entertains
- Offers surprising perspectives
- Provokes with purpose

SBS also provides the SBS Learn program, which delivers formal and informal learning outcomes informed by research and global partnerships. SBS Learn operates as an extension of SBS commissions, sport and network-wide activities, and is delivered through educators and community and digital engagement.

Content creation, acquisition and curation activities span a number of areas: SBS Television & Online, SBS On Demand, SBS News and Current Affairs, SBS Sport, SBS Radio, National Indigenous Television (NITV), social media and marketing. The success of our content is measured in a number of ways, notably audience awareness, engagement and reputational outcomes. These reputational outcomes range from Charter alignment to community impact and trust.

Planned Performance (cont.)

Our TV content creation, acquisition and curation activities cut across an expansive linear and digital network: SBS, SBS VICELAND, SBS Food, SBS World Movies, NITV and SBS On Demand. Together each channel amplifies the overall content offering, creating distinct editorial opportunities by targeting different demographics with different genres and tones.

The SBS main channel is the home of distinctive programming that inspires all Australians to explore, respect and celebrate our diverse world and in doing so, contributes to a cohesive society. It is a trusted source of news, current affairs and factual programming as well as showcasing our SBS originals that fearlessly pursue innovative, world class ideas that both inspire and entertain.

SBS VICELAND continues to drive growth within the SBS network by targeting a younger audience. SBS VICELAND builds on the breadth of the SBS main channel's offering by adding 'edgier' factual and entertainment series to the network, mixed with cult movies, quirky comedies and provocative dramas. The channel also remains the home of Australian and international basketball.

SBS Food broadcasts accessible and aspirational food programs which take viewers on a journey of cultural discovery through cuisine. We have been seeing a broadening base of viewers to include families and LOTE speakers who are looking for authentic food, cooking and travel programs delivered in a fun and informative way. Our slate of local brand-supported productions continues to grow each year, with new and established homegrown talent bringing Australia's own diverse culinary culture to life.

SBS World Movies, which launched on 1 July 2019, showcases uniquely diverse global stories in 50 languages, complementing other genres and deepening engagement across the network. SBS World Movies blends new releases and classics through thematic collections and stunts, balancing broad appeal and international titles with a focus on under-represented language groups.

NITV supports and strengthens the oldest living culture in the world through the most distinctive content offering in Australia.

NITV celebrates and champions the place of unique, inspiring storytelling through Indigenous voices. Through original authentic commissions, NITV shares culture, language and lessons today to develop strong leaders and champions of tomorrow. Using the strength of storytelling to foster change, champion equality and make an impact, NITV continues to build a legacy; building a legacy of strong, sustainable Indigenous media for the future. The content of NITV is now increasingly amplified across the network through our Indigenous content strategy, with SBS, SBS VICELAND, SBS Food and SBS On Demand all involved in a variety of co-productions, simulcasts and encores to drive audience reach and build broader awareness of the channel.

SBS On Demand is Australia's most distinctive streaming destination, enabling SBS to deliver its Charter in a digital environment. SBS On Demand represents the very best of SBS: diverse entertainment delivered by a seamless digital experience that is available free, any time on all major devices. Through our extensive content catalogue, SBS On Demand is adding depth and breadth to our major content genres, extending the life of our originals and exploring new pathway opportunities for new CALD audiences through a rich selection of in-language and captioned titles and enhanced multilingual log-in and discovery options.

Planned Performance (cont.)

SBS Radio is the world's most linguistically diverse public broadcasting service – available on radio, online, digital television and social media.

Servicing 68 languages including SBS Arabic24, SBS Radio is dedicated to the nearly five million Australians who speak a language other than English at home, while three music channels (SBS PopAsia, SBS PopDesi and SBS Chill) engage all Australians through music and pop culture from around the world. SBS has provided in-language services to Australia's LOTE speaking community since its inception.

SBS News and Current Affairs broadcasts news and current affairs across its TV, radio and digital platforms that reflect the integrity of SBS journalists and editorial processes which ensure it meets community expectations. SBS has a well-earned reputation for quality news and analysis on global events and stories and issues from across multicultural Australia.

SBS Sport secures and broadcasts a wide range of international and local sport to Australians free to air on its network, including football, basketball, cycling, racing, figure skating and equestrian competitions, uniting communities through shared passions and experiences. This includes some of the world's biggest sporting events, such as the FIFA World Cup, the Tour de France, Dakar Rally and the French Open. SBS delivers its extensive sports coverage across linear and The World Game and Tour Tracker.

SBS's social media offering shares stories, videos and other diverse content that connects Australian audiences to the world of SBS. SBS's social media profiles including Facebook, Twitter and Instagram extend the reach of SBS's content and raises awareness of the SBS brand and its unique offering with new audiences.

Intended results

The fulfilment of SBS's purpose, **to inspire all Australians to explore, respect and celebrate our diverse world and in doing so, contribute to a cohesive society**, is predominantly realised through the distinctive and compelling content that SBS provides across its many platforms.

Through the content that our audiences consume and through our brand, SBS brings our Charter and purpose to life – across broadcast television and radio, online, and social media platforms.

Planned Performance (cont.)

We want our audiences to be inspired by a richer more holistic understanding of our world which we seek to achieve by presenting surprising perspectives in entertaining ways.

Over the course of this Corporate Plan, there are three major goals that our Content activities are focused on delivering:

1. A Distinctive Network;
2. Engaged Audiences; and
3. Inspired Communities.

Achieving these three goals would further enhance our reputation as Australia's multicultural and Indigenous broadcaster and affirm our ongoing contribution to Australia's success as a vibrant, diverse and cohesive society, while also securing our relevance in a fragmenting media market.

Another key focus for SBS in FY2020-21 and beyond will be the ongoing implementation of the second iteration of the SBS digital acceleration plan to ensure that SBS continues to evolve with audience expectations and engagement patterns across our digital portfolio.

Delivery strategy

In order to achieve these outcomes, SBS will look to:

- Deepen engagement with migrant and Indigenous communities to share their stories
- Accelerate investment in digital content, platforms and capabilities
- Invest in enriching content that is purposefully provocative and promotes social cohesion and cross-cultural understanding at its core

Content creation – resourcing

Table 1.1: Proposed resourcing of SBS's Content activities

Resources	FY20-21 Budget	FY21-22 Forward estimates	FY22-23 Forward estimates	FY23-24 Forward estimates
Expenditure (\$ millions)	194.3	201.1	207.0	200.9
People (Full time equivalent)	652	652	652	652

Performance measurement and assessment

SBS currently uses a range of metrics across platforms to assess the distinctiveness and diversity of our content offering.

Planned Performance (cont.)

Table 1.2: Key performance assessment metrics – SBS Content activities

Key Performance Indicator	FY20-21 Budget	FY21-22 Forward estimates	FY22-23 Forward estimates	FY23-24 Forward estimates
Number of hours of TV programming broadcast in CALD	10,000	10,000	10,000	10,000
Number of hours of locally commissioned content broadcast (first run) on SBS and SBS VICELAND	80	80	80	80
Number of hours of locally commissioned content broadcast (first run) on NITV	30	30	30	30
% of radio broadcasts in languages other than English	90%	90%	90%	90%
Total Digital Registrations	9.50m	10.40m	11.25m	11.75m
Average Monthly Radio Podcast Downloads	1.80m	2.16m	2.59m	3.11m
Primetime Metro TV Share	8.50%	8.50%	8.50%	8.50%

2. Content Broadcast, Technology and Transmission

The Content Broadcast, Technology and Transmission activities at SBS fall largely under the responsibilities of the Technology Division. This is supported by teams from Enterprise Digital Services, Technology Operations and Services, and Enterprise Information Systems. These teams ensure SBS achieves the most effective and efficient means to distribute its distinctive content across TV, Radio and Online platforms to as many Australians as possible.

Technology continues to advance in the areas of broadcast and digital television, with a majority of households now owning smart TVs (internet enabled), and/or streaming boxes and devices such as Telstra TV, Google Chromecast or Apple TV.

The ubiquitous use of mobile phone devices, coupled with the rolling out of the 5G network across Australia, has meant that increasingly, audiences are consuming more content, on a more fragmented and ad hoc basis.

As audience consumption increasingly shifts to digital platforms, SBS will continue to find innovative ways to store, manage and publish content across all its platforms while also seeking to provide best-in-class user experience, automated content discovery and personalisation for its audiences.

Planned Performance (cont.)

The industry is moving towards a future where content recommendations will be highly personalised and provided to audiences based on their individual profiles and consumption patterns. Traditional media organisations will need to consider the breadth and fragmentation of their digital offerings, particularly distribution, process and platforms, and how they might aim to consolidate audiences.

Intended results

As audience consumption fragments across many devices, SBS can only be successful in the delivery of our purpose and Charter if the organisation migrates content to these platforms at the same pace and uses these platforms to tell stories in innovative ways. The Technology Division helps to enable this shift to new devices, while cost-effectively maintaining our legacy broadcast activities.

Over the course of this Corporate Plan, the primary goals for SBS's Technology Division are to:

- Maintain reliable and available services to all audiences, across all platforms
- Produce innovative solutions to enhance audience experience, support SBS's needs, and enable SBS to adapt to the changing environment
- Pursue opportunities to improve operational efficiency, to enable greater investment in distinctive content and services
- Provide technological solutions that support analytics and business intelligence
- Develop a workforce that is appropriately skilled to meet the changing needs of SBS

Through broadcast and narrowcast distribution of content, SBS seeks to reach and engage as many Australians as possible with its Charter-relevant content.

The investment in Charter content will only inspire and effect change to the extent that we are able to reach audiences on the various broadcast and digital platforms that Australians use in their day-to-day media consumption habits. Upgrades to transmission network infrastructure continue to deliver improved service reliability and contributes to reducing SBS's carbon footprint.

Through innovative deployment of technology and the smart use of capability partners, SBS will seek to do this in a manner that is as efficient and cost-effective as possible.

Delivery strategy

To serve content to audiences effectively and efficiently, SBS is focused on the following delivery strategy over the course of this Corporate Plan period:

- Continued investment in digital capabilities across a number of key initiatives
- Ensuring best practice is implemented to deliver content efficiently and effectively
- Delivering innovative and cost-effective solutions via new projects and initiatives that evolve the organisation in the face of a changing media landscape

Planned Performance (cont.)

Resourcing

Table 2.1: Proposed resourcing of SBS's Content Broadcast, Technology and Transmission activities

Resources	FY20-21 Budget	FY21-22 Forward estimates	FY22-23 Forward estimates	FY23-24 Forward estimates
Transmission and Distribution Expenditure (\$ millions)	72.1	72.7	73.3	74.2
People (Full time equivalent)	230	230	230	230

Performance measurement and assessment

Table 2.2: Key performance assessment metrics – SBS Content Broadcast, Technology and Transmission activities

Key Performance Indicators	FY20-21 Budget	FY21-22 Forward estimates	FY22-23 Forward estimates	FY23-24 Forward estimates
Transmission and Distribution expenditure as % of total operating expenditure	17.5%	17.3%	17.3%	17.4%
Population reach – Digital transmission sites (including VAST Satellite)	100%	100%	100%	100%
Availability of digital television transmission services (fully managed services)	99.82%	99.82%	99.82%	99.82%
Population reach for terrestrial services (excluding satellite)	97%	97%	97%	97%
Availability of Radio transmission services (fully managed services)	99.86%	99.86%	99.86%	99.86%

Planned Performance (cont.)

3. Content Commercialisation

SBS's commercial activities include SBS Media Sales, SBS In-Language translation services and SBS's Distribution and Inclusion training and consultancy businesses.

The primary purpose of SBS's commercial activities is to generate positive returns across our network portfolio of channels (SBS, SBS VICELAND, SBS Food, SBS World Movies, On-Demand and NITV) and platforms, in order to reinvest in distinctive Charter driven content for our audiences and marketing activities to support our content and community objectives.

SBS Media Sales, In-Language Translation & Distribution

SBS Media commercialises SBS content through the sale of advertising, sponsorships and brand funded opportunities across all of our free-to-air TV, radio and digital channels.

SBS Media has also created a diversity consulting business – SBS Cultural Connect – to help organisations communicate with an increasingly diverse Australia. Services offered include research, strategy and culture specific messaging in addition to the production and translation services offered through SBS In-Language.

SBS In Language provides professional translation services to Commonwealth and state government departments as well as commercial clients and agencies. Our services include NAATI Certified translation, typesetting, video production, subtitling, cross cultural consultancy, voice overs and narration. We operate in accordance with an accredited Quality Management System (QMS) compliant to ISO 9001:2015.

SBS Distribution continues to grow its substantial online Inclusion training program to build capability in organisations around Disability, LGBTIQ, Gender, Indigenous culture, Age, and, Cultural Diversity. SBS Distribution also extends the reach, brand and commercial returns of SBS content through promotional partnerships across cinema, music and events.

Intended results

SBS's content commercialisation activities have one overarching goal – to maximise the net contribution from their activities in order to reinvest funds into distinctive and compelling Charter content, further investment in the digital acceleration plan and to maintain or improve the quality of our services to Australian audiences.

Through the breadth of its commercial activities, SBS also seeks to lengthen the life of its distinctive content and broaden the reach of SBS's brand.

The immediate impact of COVID-19 has seen the advertising market slow down, with companies reducing their advertising spend to reduce costs. This has negatively impacted SBS's revenues for the FY2019-20 and FY2020-21 periods.

Planned Performance (cont.)

As the traditional free-to-air advertising model comes under increasing audience and revenue pressure aside from COVID-19, over the course of this Corporate Plan period, SBS's commercial activities will seek to:

- Maximise the financial returns on available channel and platform inventory while maintaining competitive network pricing on each of SBS's free-to-air channels and across the different metropolitan and regional markets, in line with the restrictions on the amount of advertising permitted on SBS broadcast services and editorial guidelines
- Continue to significantly grow online revenues consistent with market dynamics, shifts in audiences and consumption habits across digital platforms and content investment
- Grow or maintain margins in legacy distribution businesses while investing for growth in emerging business models such as training and consultancy
- Continue to attract revenues through unique brand partnership opportunities focussed on content and product innovation, to offset increased price inflation resulting from current and forecast FTA market trends

Delivery strategy

Our delivery strategy across our commercial activities focuses on the following:

- Offering a unique and dynamic brand and audience proposition to direct and agency advertising clients
- Showcasing our diverse audience position and the cost effectiveness which SBS platforms can offer due to lower SBS cost per audience reach point metrics
- Deepening relationships with existing and new clients, with a consistent approach to national and interstate opportunities
- Continuing to capitalise on the growth in digital programmatic sales through investment in appropriate digital sales technologies and strategic partnering with external supply-side-platforms
- Showcasing trade marketing initiatives and thought leadership research designed to keep our brand salient with media agencies and clients and showcase our unique and diverse point of view
- Continuing to review operational processes and systems to ensure best practice, and to ensure appropriate focus and investment in automated buying technologies, including new technology initiatives to monetise the introduction of industry based cross-platform audience metrics
- Ensuring we attract and retain the best staff to continuously improve on the delivery of our strategy and build the desired team culture

Resourcing

Table 3.1: Proposed resourcing of SBS's Content Commercialisation activities

Resources	FY20-21 Budget	FY21-22 Forward estimates	FY22-23 Forward estimates	FY23-24 Forward estimates
People (full time equivalent)	159	159	159	159

Planned Performance (cont.)

Table 3.2: Key performance assessment metrics – SBS Content Commercialisation activities

Key Performance Indicator	FY20-21 Budget	FY21-22 Forward estimates	FY22-23 Forward estimates	FY23-24 Forward estimates
Total Ownsource (\$ millions)	112.1	120.5	130.6	127.6

4. Content Support Activities

SBS's support activities encompass the back office functions that support SBS's primary content, distribution and commercial activities. These functions include human resources and organisational development, corporate affairs, legal, corporate services and finance. Some of the key deliverables across SBS content support activities include:

- Developing people capabilities and facilitating employee performance management processes
- Managing community, government and industry stakeholder relationships
- Managing finance and accounting functions
- Developing SBS's corporate strategy and managing the organisation's planning process
- Managing SBS's risk management frameworks and processes
- Maintaining SBS's building infrastructure and developing strategies to meet SBS's long-term physical accommodation needs
- Delivering SBS's corporate and back of house functions using the most effective and efficient models

Intended results

In support of key strategic goals, SBS's content support activities seek to:

- Identify and establish effective operational partnerships that
 - ensure the most efficient balance between in-house and outsourced capability
 - allow SBS to focus on the core activities of content and commercialisation
- Utilise a proactive and responsive approach to support the organisation in an innovative manner
- Continuously find ways to deliver a more efficient and effective operating model for SBS
- Ensure that SBS maintains appropriate funding levels that enable it to deliver on its Charter in an efficient manner
- Deepen community, industry and Indigenous stakeholder relationships and form partnerships to deliver targeted projects that increase the public value of SBS
- Maintain high staff engagement to promote a productive and happy workforce that is well trained, with a focus on succession and talent planning

Planned Performance (cont.)

Delivery strategy

In order to achieve the above results, SBS content support activities will seek to:

- Facilitate the development of core management and leadership capabilities
- Manage and enhance relationships across all levels of government, demonstrating the relevance and value of SBS to political stakeholders and securing government funding
- Extend engagement with communities on a national scale, including through outreach activities
- Lead the implementation of best in class risk management processes and frameworks
- Help to ensure that the allocation of resources matches the achievement of our purpose and the organisation's strategic goals
- Create a workforce that is appropriately skilled to meet the changing needs of SBS and delivers exceptional service
- Make SBS a great place to work for all employees

Resourcing

Table 4.1: Proposed resourcing of SBS's content support activities

Resources	FY20-21 Budget	FY21-22 Forward estimates	FY22-23 Forward estimates	FY23-24 Forward estimates
People (full time equivalent)	108	108	108	108

Performance measurement and assessment

Table 4.2: Key performance assessment metrics – SBS content support activities

Key Performance Indicator	FY20-21 Budget	FY21-22 Forward estimates	FY22-23 Forward estimates	FY23-24 Forward estimates
Content support activities – share of total operating expense (%, including transmission)	10%	10%	10%	10%
Content support activities – share of total FTEs (%)	10%	10%	10%	10%

Summary Financial Performance

A summary of SBS's financial performance over the period covered by this Corporate Plan is outlined in the table below.

Table 5: SBS Summary Financial Forecast (FY20-21 to FY23-24)

Forecast of Financial Performance \$ millions	FY20-21 Budget	FY21-22 Forward estimates	FY22-23 Forward estimates	FY23-24 Forward estimates
Revenue				
Total Own Source	112.1	120.5	130.6	127.6
Government Appropriation	294.8	300.4	293.8	299.1
Total Revenue	406.9	420.9	424.4	426.7
Operating Expenditure	339.3	347.7	350.6	352.0
Transmission and Distribution Expenditure	72.1	72.7	73.3	74.2
Total Operating Expenditure	411.4	420.4	423.9	426.2
Operating Surplus	-4.5	0.5	0.5	0.5
Assessment of Taxes and Charges Payable	8.5	8.8	8.8	8.9
Capital Expenditure	8.0	10.0	10.0	10.0

Capabilities

People

Now more than ever, our people are critical to our success as an organisation.

COVID-19 has provided a workforce challenge for organisations across Australia, and in response SBS has stepped up to the mark, ensuring employee mental and physical wellbeing has been protected through these difficult times.

SBS has enabled a proactive and comprehensive working from home strategy to ensure the business continues to operate at full capacity, whilst providing a level of flexibility for staff and their families.

SBS has a focus on delivering key strategic priorities over the coming years to support the delivery of the overarching SBS strategic goals and business initiatives. The plan considers:

- The current environment in which SBS operates;
- The competitive impacts on talent, and attraction and retention;
- The organisational culture of SBS and its suitability for the organisation;
- The role that Diversity & Inclusion plays in shaping our future workforce;
- The changing needs of leadership and associated leadership behaviours; and
- Agile and collaborative ways of working particularly in a digital context

At SBS we have continued our commitment to create a high performing culture with people at its heart.

There are a number of market trends that will affect SBS's workforce over the four year period of this Corporate Plan, including:

- The changing nature of work and the demographic changes of the workplace
- A highly competitive talent market particularly in digital skills will make attraction and retention a challenge
- Increasing prevalence of mental health issues in the workplace and a greater focus on employee wellbeing, flexibility and work life balance
- Focus on the importance of Diversity & Inclusion, including the competitive advantage it brings, and the impacts of social movements and greater transparency in gender pay parity and representation
- Increased regulation, governance and audit with a focus on the role of 'trust' within organisations
- Changing face of modern leadership in the face of more agile, self-managed and autonomous ways of working
- The need for a clear data strategy and data driven decision making in human resources

Capabilities (cont.)

In a media environment where industry convergence is facilitated by IP-delivered platforms, yet audiences increasingly fragment across these platforms, there are some human resource capability challenges that are particularly relevant:

- A shift away from skills that are largely platform and function specific, to those that are platform and function agnostic
- Achieving the right balance of technical expertise, project management skills, change management and general management capabilities
- Detailed and in-depth understanding of the audience, external environment and ever-changing market dynamics
- Expertise in data, data management, data analytics and data visualisation
- Content and product innovation capabilities

Adding to the above challenges, SBS must compete with new and traditional media players in a funding environment that is limited, and with restrictive workplace frameworks that can impact on SBS's ability to attract and retain talent.

We aim to achieve our goal of becoming an even more purpose-led, values-driven organisation by applying a values driven lens to our activities and with particular focus on four core People & Culture strategic imperatives:

Trust & Empowerment

Building deeper trust with our people and empowering them to make decisions, driving autonomy, accountability and bias towards action and results.

Performance & Collaboration

Enabling a high performance and improvement driven organisation where collaboration, learning and innovation are the ways in which we always do business

Diversity & Inclusion

Building a purpose led organisation where the external focus on our Charter is matched by an equal commitment to a highly Inclusive workplace

Governance & Compliance

Ensuring that as a hybrid funded government broadcaster we meet our obligations under the SBS Act to be a model employer

Over the course of this Corporate Plan period, our key initiatives which will help deliver the goals above include:

- Responding to COVID-19 in order to protect our people, operations and organisation, and to create new opportunities to reimagine and reform our business
- Deliver on governance and foundational enhancements such as new rostering and HR analytics systems
- Deliver on our inclusion strategy with an increased focus on diversity in management representation
- Evolve our employer brand and employee value proposition in response to market changes. Ensure our values are explicitly named, defined and communicated to the organisation
- Improve employee experience through better life cycle management, for example, seamless and integrated onboarding

Capabilities (cont.)

- Evolve our leadership model, leadership development, and leadership capability in response to the impacts that digital has had on our ways of working
- Continuing to improve and further develop new ways of working and build collaborative ways of working at scale across the business
- Launch targeted performance coaching program designed to enhance front line leadership skills in the fundamentals of managing performance
- Develop our health & wellbeing program with a focus on mental health and becoming an accredited mentally healthy workplace
- Continue to build plans and initiatives to drive the highest level of employee engagement and experience

Technology

As audience consumption fragments across an increasing array of devices, media companies need to provide a seamless experience that offers a consistent look and feel while delivering a tailored content offering for each user. Meanwhile, as audiences become increasingly digital in their consumption habits, media companies will also need to use audience intelligence and understanding to offer mass customisation and personalisation of the user experience.

In order to deliver a premium user experience, SBS will have to further expand capabilities in the following areas over the coming four year period:

- Audience intelligence and insights
- Cross-platform content management
- Metadata management
- Mass customisation and personalisation of digital services

To establish these technological capabilities in a cost-effective manner, SBS will seek to implement solutions that strengthen existing technology foundations, while utilising:

- 'Off the shelf' products, which ensure SBS is not re-inventing the wheel and can access 'best of breed' technology
- Open-source technology for in-house development, which allows access to a larger pool of competitive labour and lowers total cost of ownership

Risk Management

SBS's Risk Management Framework (RMF) provides a holistic approach to risk management that promotes an integrated and informed view of risk exposures across SBS. The framework is designed to manage risk and provide assurance that risks are being managed within the risk appetite established by the SBS Board of Directors.

The RMF is the total aggregation of systems, structures, policies, processes and people within SBS that identify, assess, control, and monitor all sources of risk that could have an impact on SBS and its ability to deliver its strategy. A holistic view of both short and long term risk across the 2020-21 period and for the four year period covered by this plan is considered by SBS under this framework. The desired result of the framework is to provide management with:

- A strong frame of reference for strategy setting and decision making
- An integrated framework to effectively manage uncertainty and obligations, respond to risks, as well as capitalise on opportunities as they arise
- The ability to manage risks across SBS by providing accurate and timely reporting on the profile of risks and controls
- Minimum standards for the governance, processes and tools required to administer the requirements of SBS's Risk Management Strategy

Figure 2 summarises the RMF.

Figure 2: SBS Risk Management Framework



Risk Management (cont.)

The SBS Board approves the organisation-wide risk appetite statements that provide the frame of reference for strategy setting and decision making. Figure 3 illustrates the risk appetite for SBS's material classes of risk.

Figure 3: Summarised risk appetite statement

Risk Appetite Range				
No/Low Appetite	Limited Appetite	Moderate Appetite	Moderate to High Appetite	High Appetite
Strategy and Planning Corporate Strategy HR Health and Safety (non-assignment) Finance, Accounting and Tax Governance, Risk and Compliance Brands and Content Commissioning of Content Brands and Content Exploitation of Content (SBS Act, Codes or Editorial Guidelines) IT Transmission Continuity	Strategy and Planning Industry Partnership and Outsourcing Production HR Health and Safety (on assignment) IT Security IT Financial System	Stakeholder Management Government & Community Content Distribution Digital Platforms IT Internal Systems and Infrastructure Legal Development and Production Production	HR Talent and Capability Brand and Content Exploitation of Content (Brand Placements) Content Distribution Rights	Development and Production Development Brands and Content Acquisition of Content
Philosophy Towards Risk Taking				
SBS accepts as little risk as possible	SBS takes a cautious approach towards taking risk	SBS takes a balanced approach to risk taking	SBS takes a higher level of risk for increased benefit	SBS takes a bold approach towards taking risk as it is considered core to SBS' strategy and purpose
Preferred Risk Treatment Approach				
Those risks that cannot be effectively treated or transferred are avoided	Preference to avoid risk or transfer it to an outside party or use secondary mechanisms	There is no preference and the risk treatment will be considered depending on the context and benefit to SBS	Preference to accept or reduce risk through internal measures	Risk is accepted as much as the Charter/Act permits

Risk Management (cont.)

During the course of the strategic planning cycle and the development of the annual business unit operating plans, the risks are reviewed and assessed against the Board-approved risk appetite statements. An internal audit plan for the following 12 months along with the broader governance, mitigation and assurance mechanisms are developed to a significant extent from this risk assessment process.

The SBS Audit and Risk Committee receive regular reports on the management of the identified “highest risks” facing SBS, with identification of risks allowing redirection or refocusing of resources to address key issues.

SBS has identified the top 3 risks facing the organisation in this reporting period:

1. Loss of audience or relevance

There is a risk that SBS suffers from a loss of audience and/or relevance with audiences, particularly with increased competition from other free-to-air broadcaster and digital media streaming platforms. SBS is ensuring that it prevents a sustained fall in audience share or relevance by building capabilities to better understand community behaviours and preferences, tailoring programming suitable to its audiences and Charter and offering its content, supported by marketing campaigns and promotions across linear and digital platforms.

2. COVID-19 – impact on staff, operations and organisation

COVID-19 presents a key risk to SBS’s staff, audience, suppliers and stakeholders. Although the duration and depth of disruption is unknown and evolving, SBS is managing what it can control effectively drawing on evolving better practice and monitoring key health guidance (both State and Federal) with a focus on staff health and wellbeing. SBS has established a COVID-19 project team, with a Steering Committee reporting back to the Executive, with three work streams focused on protecting our people, protecting our operations and protecting our organisation.

3. Organisational capability

This reflects the risk associated with a loss of key personnel and talent, particularly talent with highly sought-after digital capabilities. SBS responds to this risk by conducting talent and succession planning, digital leadership training and support through the “It’s How We Lead” program and the execution of strategies to attract digital talent.

Appendices

Appendix 1: The SBS Charter

The SBS Charter, contained in Section 6 of the *Special Broadcasting Service Act 1991 (SBS Act)*, sets out the principal function of SBS and a number of duties it has to fulfil in performing its principal function. It states:

The principal function of the SBS is to provide multilingual and multicultural broadcasting and digital media services that inform, educate and entertain all Australians, and, in doing so, reflect Australia's multicultural society.

The SBS, in performing its principal function, must:

- a) contribute to meeting the communications needs of Australia's multicultural society, including ethnic, Aboriginal and Torres Strait Islander communities; and
- b) increase awareness of the contribution of a diversity of cultures to the continuing development of Australian society; and
- c) promote understanding and acceptance of the cultural, linguistic and ethnic diversity of the Australian people; and
- d) contribute to the retention and continuing development of language and other cultural skills; and
- e) as far as practicable, inform, educate and entertain Australians in their preferred languages; and
- f) make use of Australia's diverse creative resources; and
- g) contribute to the overall diversity of Australian broadcasting and digital media services, particularly taking into account the contribution of the Australian Broadcasting Corporation and the community broadcasting sector; and
- h) contribute to extending the range of Australian broadcasting and digital media services, and reflect the changing nature of Australian society, by presenting many points of view and using innovative forms of expression.

Appendix 2: Role and Duty of the SBS Board

The role and duties of the SBS Board are set out in sections 9 and 10 (1) of the SBS Act. The SBS Board is committed to fulfilling its duties as set out in the SBS Act and it does so through well-established corporate governance processes.

- The SBS Board holds regular meetings throughout the year, providing Board members with an opportunity to obtain detailed information about management and operational issues, and to make key decisions regarding the Corporation. The Board receives a comprehensive suite of reports, and members of the SBS Executive attend Board meetings as required to answer questions and provide insight into activities, programming policies, management decision making, and the efficiency and effectiveness of the Corporation.
- The *SBS Codes of Practice* are developed by the Corporation, in consultation with the Board Codes Review Sub-committee, and approved by the Board. The *SBS Codes of Practice* set out the principles and policies SBS uses to guide its programming. Compliance with the *Codes of Practice* is monitored by the Board at its regular meetings. The *SBS Codes of Practice* are notified to the Australian Communications and Media Authority in accordance with s10(1)(j) of the SBS Act.

Appendices (cont.)

- Guidelines on advertising and sponsorship matters are developed by the Corporation and approved by the Board as part of the *SBS Editorial Guidelines*. The *SBS Codes of Practice* (Code 5) and the *Editorial Guidelines* (Guideline 5.5) set out SBS's guidelines on advertising and sponsorship and the placement of breaks in SBS television and radio services.
- The Audit and Risk Committee provides independent assistance to the SBS Board on the Corporation's risk, control and compliance framework, and its external accountability responsibilities. Through the Audit and Risk Committee, the Board is able to monitor the Corporation to ensure that it does not contravene or fail to comply with applicable legislative obligations.
- The Board has representation on the SBS Community Advisory Committee, which is established under section 50 of the SBS Act. The Community Advisory Committee meets several times a year to discuss issues of relevance to SBS and to give advice, raise community concerns and provide feedback on programming and projects to the SBS Board.

Consistent with its duties, the Board undertakes other activities as required, such as submitting annual reports to government regarding compliance with the *Public Governance, Performance and Accountability Act 2013*; considering relevant statements of policy furnished by government; and considering and approving broader SBS strategies such as those contained in the SBS Corporate Plan.

Appendix 3: Community Consultation Measures

Under Section 50 of the SBS Act, the Board must establish a Community Advisory Committee to assist the Board to fulfil its duty under paragraph 10(1)(g)—the Community Advisory Committee does this by advising the Board on community needs and opinions, including the needs and opinions of small or newly-arrived ethnic groups, on matters relevant to the Charter.

In addition to the Community Advisory Committee, SBS management has established a number of additional processes to ensure that it is aware of, and responsive to, community needs and opinions (including the needs and opinions of small or newly arrived ethnic groups) on matters relevant to the Charter. These include, but are not limited to, the following:

- Forums around Australia involving key community stakeholders from multicultural and Indigenous communities, together with SBS Board members and Executives
- Evolution of the activities associated with SBS's Inspire Communities focus area, to respond to the changing needs of our communities, their improved access to content due to technology, and the ambitions and changing role of partner and peer organisations
- Receiving feedback via SBS Radio's in-language broadcasting activities
- Content-related outreach activities
- Involvement in community programs and partnerships with multicultural and Indigenous stakeholders
- Regular qualitative and quantitative audience research into SBS programming

Appendices (cont.)

Appendix 4: Cooperation with other bodies

SBS cooperates with a range of government, corporate, industry and non-profit organisations that make a significant contribution to SBS to help it deliver on its Charter and achieve its purpose.

We wish to thank the organisations listed below and all other organisations who support and cooperate with SBS.

No	Nature of Cooperation	Name of Organisation
1	AIDC is the preeminent event for unscripted production in Australia. Along with Screen Forever (which is run by Screen Producers Australia) AIDC is a key conference for SBS where it engages with the screen production sector on the SBS commissioning strategy for the year.	Australian International Documentary Conference (AIDC)
2	The Australian National Maritime Museum in Sydney partners with SBS on various projects and exhibitions which celebrate Australia's migrant stories.	Australian National Maritime Museum
3	SBS broadcasts the <i>Eurovision – Australia Decides</i> show in February each year, with the City of Gold Coast as its host partner.	City of Gold Coast
4	SBS partners with First Languages Australia, who represents community language schools nationally, to deliver the SBS National Languages Competition.	Community Languages Australia
5	Create NSW provides funding and support on various SBS TV productions and development projects from time to time. Create NSW also participates in the SBS Diversity Talent Escalator.	Create NSW
6	Documentary Australia Foundation provides funding and support on various SBS TV productions, development projects and fellowship programs from time to time.	Documentary Australia Foundation
7	SBS partners with the Ethnic Communities Council of NSW, the peak organisation for multicultural communities in NSW, to deliver the Speak My Language program which provides information to older Australians from CALD communities on topics that affect the ageing population and how to access aged care support services.	Ethnic Communities Council of NSW
8	SBS broadcasts the Eurovision Song Contest in May each year and has organised Australia's participation in the event since 2015, in partnership with the EBU.	European Broadcasting Union
9	SBS is the primary Media Partner of the biennial FECCA National Conference, a preeminent forum which brings together the community sector to discuss and debate issues related to Australia's multiculturalism.	Federation of Ethnic Communities' Councils of Australia (FECCA)

Appendices (cont.)

No	Nature of Cooperation	Name of Organisation
10	Film Victoria provides funding and support on various SBS TV productions, development projects and fellowship programs from time to time. Film Victoria also participates in the SBS Diversity Talent Escalator, a national initiative focused on increasing the representation of Australia's diverse communities within the television production sector.	Film Victoria
11	SBS partners with First Languages Australia, who represents Indigenous language learning through schools and organisations, to deliver the SBS National Languages Competition.	First Languages Australia
12	SBS (through NITV) is an affiliate member of First Nations Media Australia, Australia's national peak body for First Nations not-for-profit broadcasting, media and communications.	First Nations Media Australia
13	SBS is an associate member of Freeview, a free digital television service in Australia that shows all free-to-air TV channels online on one platform.	Freeview
14	SBS is a member of the Media RING, a volunteer association of industry and screen organisations whose purpose is to develop and enhance career opportunities for Indigenous Australians in the media through advocacy, knowledge sharing and promoting the diversity of Indigenous stories.	Media Ring (Reconciliation Industry Network Group)
15	SBS works with Multicultural NSW to foster cohesion among the diverse multicultural communities of NSW by partnering on various events organised by the entity, such as the NSW Premier's Harmony Dinner and the New South Wales Premiers' Multicultural and Communications Awards.	Multicultural NSW
16	SBS is the principal Media Partner and Education Partner of NAIDOC Week which is held in July every year. This is pursuant to a 3 year partnership with the National NAIDOC Committee and Department of the Prime Minister and Cabinet. The partnership commenced in 2019.	National NAIDOC Committee
17	Through its Reconciliation Action Plan and the Reconciliation Film Club, SBS works with Reconciliation Australia, which is the lead body for reconciliation in Australia, to build relationships, respect and trust between Indigenous and non-Indigenous Australians.	Reconciliation Australia
18	SBS is a member of SDIN, a network of broadcasters, screen funding agencies, business associations, guilds and industry-aligned education and training organisations who have committed to work together towards a more inclusive and diverse screen industry, by progressing diversity objectives and addressing barriers to inclusion in the sector.	Screen Diversity and Inclusion Network (SDIN)

Appendices (cont.)

No	Nature of Cooperation	Name of Organisation
19	Screen Australia provides funding and support on various SBS TV productions, development projects and fellowship programs from time to time.	Screen Australia
20	Screen NSW provides funding and support on various SBS TV productions, development projects and fellowship programs from time to time.	Screen NSW
21	Screen Producers Australia provides support on various SBS TV productions and development projects from time to time.	Screen Producers Australia
21	Screen Tasmania provides funding and support on various SBS TV productions, development projects and fellowship programs from time to time. Screen Tasmania also participates in the SBS Diversity Talent Escalator.	Screen Tasmania
23	Screen Territory provides funding and support on various SBS TV productions, development projects and fellowship programs from time to time. Screen Territory also participates in the SBS Diversity Talent Escalator.	Screen Territory
24	Screen Queensland provides funding and support on various SBS TV productions and development projects from time to time. Screen Queensland also participates in the SBS Diversity Talent Escalator. Screen Queensland is also a Strategic Partner for SBS's <i>Eurovision – Australia Decides</i> television event, which is held in the Gold Coast each year since 2019.	Screen Queensland
25	ScreenWest provides funding and support on various SBS TV productions, development projects and fellowship programs from time to time. ScreenWest also participates in the SBS Diversity Talent Escalator.	ScreenWest
26	SBS works with SSI to create awareness of settlement support services for new migrants, refugees and asylum seekers living in NSW by supporting various events organised by the entity, such as Refugee Week.	Settlement Services International
27	SAFC provides funding and support on various SBS TV productions, development projects and fellowship programs from time to time. SAFC also participates in the SBS Diversity Talent Escalator.	South Australia Film Corporation (SAFC)
28	SBS broadcasts the Sydney Gay & Lesbian Mardi Gras parade in March each year and is the official Broadcast Partner of the Sydney Gay and Lesbian Mardi Gras organisation.	Sydney Gay and Lesbian Mardi Gras
29	SBS (through NITV) engages with the ACTF across much of its children's commissioned content. ACTF represents the interests of this content on the international market and makes direct financial investment in SBS commissioned content.	The Australian Children's Television Foundation (ACTF)

Appendices (cont.)

No	Nature of Cooperation	Name of Organisation
30	The ADG controls the parameters of commercial engagements with Australian directors across SBS' commissioned content output.	The Australian Directors Guild (ADG)
31	SBS engages with the AFTRS on its talent escalation strategy and looks to the film school for guidance on emerging talent. SBS frequently collaborates with AFTRS on its TV Talks program; a networking opportunity across the production sector in NSW and other programs at the AFTRS HQ and interstate.	The Australian Film Television and Radio School (AFTRS)
32	The WGA controls the parameters of commercial engagements with Australian writers across SBS' commissioned content output.	The Writers Guild of Australia (WGA)
33	SBS broadcasts the <i>Eurovision – Australia Decides</i> show in February each year, with Tourism and Events Queensland as its strategic partner.	Tourism and Events Queensland
34	SBS is the primary media partner for International Women's Day, celebrated on 8 March every year, and helps to raise awareness for gender equality on the day.	UN Women Australia
35	SBS works with the Victorian Multicultural Commission to foster cohesion among the diverse multicultural communities of Victoria by supporting various events organised by the entity, such as Cultural Diversity Week and Victorian Premier's Harmony Dinner.	Victorian Multicultural Commission
36	SBS (through NITV) is a Media Supporter of the Garma Festival, which is held in August every year. Garma is Australia's largest Indigenous cultural gathering to celebrate Yolngu and other Indigenous cultures and a key forum for the discussion of Indigenous affairs.	Yothu Yindi Foundation

Appendices (cont.)

Appendix 5: References

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